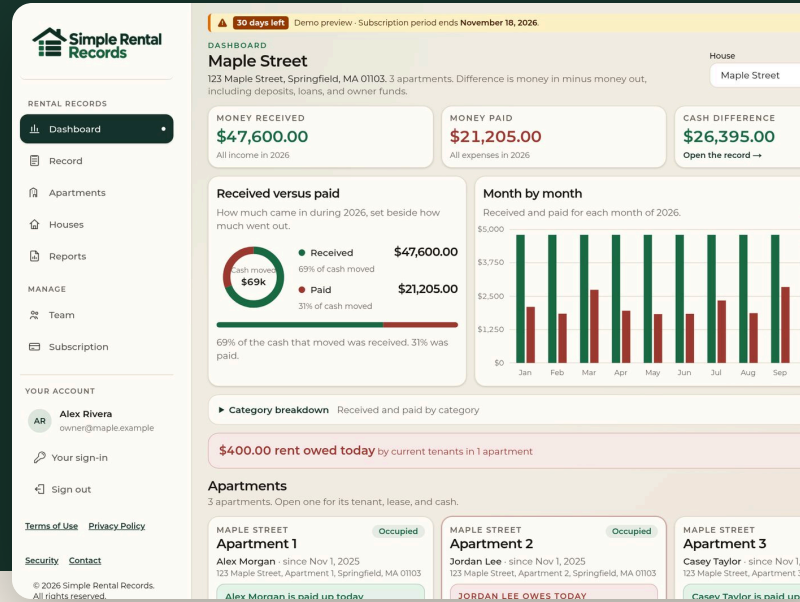




USER GUIDE

Keep your rental books, step by step.

How to set up your business, houses, apartments, and tenants in the right order, record rent and expenses, and produce reports for your tax preparer.

CONTENTS

What is in this guide

PART 1 Getting started

Read these first

- 1 Welcome and key terms** **3**
What the app does, the words it uses, and how to find your way around.
- 2 Setting up in the right order** **START HERE** **5**
The setup roadmap, why the order matters, and a checklist.

PART 2 Setting up your books

Roadmap steps 1–8, in order

- 3 Creating your account and business** **STEP 1** **7**
Sign up, confirm your email, sign in, or join with an invite code.
- 4 Houses and apartments** **STEPS 3–4** **10**
Addresses, more houses, apartment names, and monthly rent.
- 5 Categories** **STEP 5** **12**
The starter list, adding your own, and which category to use.
- 6 Tenants, leases, and rent balances** **STEP 6** **14**
Current and earlier tenants, leases, rent changes, and move-outs.
- 7 Bringing in past records** **STEP 7** **17**
Import this year's earlier payments from a CSV spreadsheet.
- 8 Monthly payments** **STEP 8** **18**
Reminders for rent and regular bills that you confirm each month.

PART 3 Every month

Your regular routine

- 9 Recording money day to day** **20**
Record payments with receipts; search, correct, and follow up.
- 10 The dashboard and apartment pages** **23**
Yearly totals, charts, and what tenants owe today.
- 11 Reports** **25**
Five reports, including the Schedule E worksheet, as PDF or CSV.

PART 4 Your business and account

Any time

- 12 Working with a team** **27**
Owners and members, invitations, and more than one business.
- 13 Keeping your account secure** **STEP 2** **29**
Passwords, authenticator app, recovery codes, and devices.
- 14 Your free trial and subscription** **30**
Plans, checkout, billing, early renewal, and vouchers.
- 15 Taking your data with you** **32**
Export the ledger, reports, receipts, and leases.

PART 5 Help

When you need it

- 16 Troubleshooting and common questions** **33**
Answers to the questions landlords ask most.
- 17 Getting help** **34**
Contact us, our policies, and a quick-reference table.

CHAPTER 1

Welcome and key terms

Simple Rental Records keeps the money, tenants, leases, and receipts for your rental houses in one place, then turns them into totals and reports.

HOW TO USE THIS GUIDE

New to Simple Rental Records? Read chapters 1 and 2 first, then work through chapters 3 to 8 in order. They follow the setup roadmap. After setup, chapters 9 to 11 cover what you will do every month. Buttons and labels you click in the app look like this: **Record a payment**.

Prefer to watch? A 7-minute video tour with captions covers the same chapters at simrentrec.com/guide.

Screenshots show the shared demo books, which contain fictional tenants and amounts. Your screens show your own records.

What you can do

- Record rent received and expenses paid, by house, apartment, and category.
- Attach receipt photos and PDFs to each payment.
- Keep tenant contact details, move-in and move-out dates, and leases.
- See what each tenant owes today.
- Follow yearly totals and month-by-month charts.
- Run five reports, including a Schedule E worksheet, as PDF or CSV.
- Set reminders for monthly rent and bills.
- Share the books with a partner or bookkeeper.

Key terms

Term	What it means
Business	One set of books. Everything (houses, payments, reports, team) belongs to a business. You can belong to more than one and switch between them. The subscription is per business.
House	A rental property with a street address. A business can have up to 10 houses.
Apartment	A rentable unit inside a house, with its own monthly rent and tenant. A single-family house has one apartment.
Whole building	A special row that every house has, for shared costs such as insurance, property taxes, or a roof repair that belongs to no single apartment.
Tenant (stay)	A person renting an apartment from a move-in date until a move-out date. Earlier tenants are kept, so history is never lost.

Term	What it means
Category	What money was for: Rent, Repairs, Utilities, Insurance, and so on. Categories drive the totals and the Schedule E worksheet.
Payment (entry)	One amount of money received or paid on a date, for an apartment and a category. Payments are listed on the Record page.
Owner / Member	The two roles in a business. Owners manage houses, rent, categories, people, imports, and billing. Members record payments, manage tenants, and run reports.

Finding your way around

After you sign in, the sidebar on the left (the menu button on a phone) takes you to every part of your books:

Sidebar item	Use it to
Dashboard	See money received, money paid, and the difference for the year, with charts and the rent owed today.
Record	Record a payment, search and filter payments, and correct or delete them. Import & recurring is here too.
Apartments	Open an apartment for its tenant, lease, rent balance, and cash.
Houses	Add houses and apartments, set addresses and monthly rent, and manage categories.
Reports	Run, save, print, and download reports.
Team	Invite people and manage who can open the books.
Subscription	See the trial countdown and choose a plan.
Your sign-in	Change your password, set up two-step sign-in, and sign out other devices.
User guide	Open the video tour and this guide at any time.

On most pages you can choose the **House** (or **All houses**) and the **Year** at the top right. The choice follows you as you move between Dashboard, Record, and Apartments.

CHAPTER 2

Setting up in the right order

Some things depend on others. A tenant needs an apartment, a balance needs a rent amount, and an import needs matching names. Follow this order and nothing has to be redone.

The setup roadmap

Step 1

Create your account and business

Name, email, password, business name, first house, and its apartment count. Confirm your email. → Chapter 3

Step 2

Secure your sign-in

Optional but recommended: turn on an authenticator app and save your recovery codes. → Chapter 13

Step 3

Finish your houses

Add each house's address, add any other houses, and name the apartments. → Chapter 4

Step 4

Set the monthly rent

Enter the rent for every apartment. Rent balances are worked out from it. → Chapter 4

Step 5

Review categories

Use the starter list, rename or add your own before importing. → Chapter 5

Step 6

Add your tenants

Name and move-in date for each occupied apartment, then contact details, mailing address, and the lease. → Chapter 6

Step 7

Bring in past records

Import this year's earlier payments from a spreadsheet, or type them in. → Chapter 7

Step 8

Set up monthly payments

Reminders for rent and regular bills, confirmed each month. → Chapter 8

Then

Record as you go

Rent, repairs, and bills, with receipts, as they happen. → Chapter 9

Then

Review and report

Check the dashboard and follow-ups monthly; run reports at tax time. → Chapters 10–11

Any time

Invite your team

A partner, spouse, or bookkeeper. → Chapter 12

Before day 30

Choose a plan

Monthly or yearly, so the books stay editable. → Chapter 14

Why this order matters

Create this first...	...before this	Because
Business	Everything else	All records live inside a business.
House and apartments	Tenants and payments	Every tenant and every payment belongs to an apartment (or the whole building).
Monthly rent	Tenants	A new tenant's rent starts from the apartment's rent, and what they owe is counted from it.
Tenant move-in date	Rent balances	Rent is due from the move-in day; part months are counted by the day.
Houses, apartments, and categories	CSV import	Import rows are matched to these by name, exactly. A name that does not exist stops the import.
Payments	Reports and totals	Reports and the dashboard are built from the payments you record.

Setup checklist

- ☐ Account created and email confirmed
- ☐ Authenticator app and recovery codes saved
- ☐ Every house added, with its address
- ☐ Apartments named to match your leases
- ☐ Monthly rent set for every apartment
- ☐ Categories reviewed
- ☐ Tenant and move-in date for each occupied apartment
- ☐ Leases uploaded
- ☐ Earlier payments for this year imported or entered
- ☐ Monthly payment reminders created

TIP: TRY THE DEMO FIRST

On the home page, **Try Live Demo** opens shared sample books with three tenants and a year of payments. Click around freely. Changes are erased every night, and you should not enter personal information there.

Creating your account and business

Signing up creates your account, your business, and your first house in one step. No payment card is needed for the 30-day trial.

Simple Rental Records

Home Features Reports Pricing Help Contact Sign in Start free trial →

Built for independent landlords

Clear books. More peace of mind.

Keep rent, expenses, and tenant details together. See where your rentals stand, without rebuilding a spreadsheet every month.

Start free trial → See how it works

✓ 30-day free trial ✓ No credit card required

Rent & expenses
Easy to track

Tenants & leases
Histories in one place

Reports
Ready to print or download

DASHBOARD
Maple Street
Jan - Jun 2026

RECEIVED \$28,400 PAID \$12,950 DIFFERENCE \$15,450

Month by month

Month	Received	Paid
Jan	\$4,400	\$1,500
Feb	\$4,400	\$1,200
Mar	\$4,400	\$1,700
Apr	\$4,400	\$1,200
May	\$4,400	\$1,500
Jun	\$4,400	\$1,700

June rent \$4,400 of \$4,800

Apt	Tenant	Amount	Status
AM Apt 1	Alex Morgan	\$1,500	Paid
AL Apt 2	Jordan Lee	\$1,200	Partial
CT Apt 3	Casey Taylor	\$1,700	Paid

Take a look around
Explore the real app with sample records.

Try Live Demo

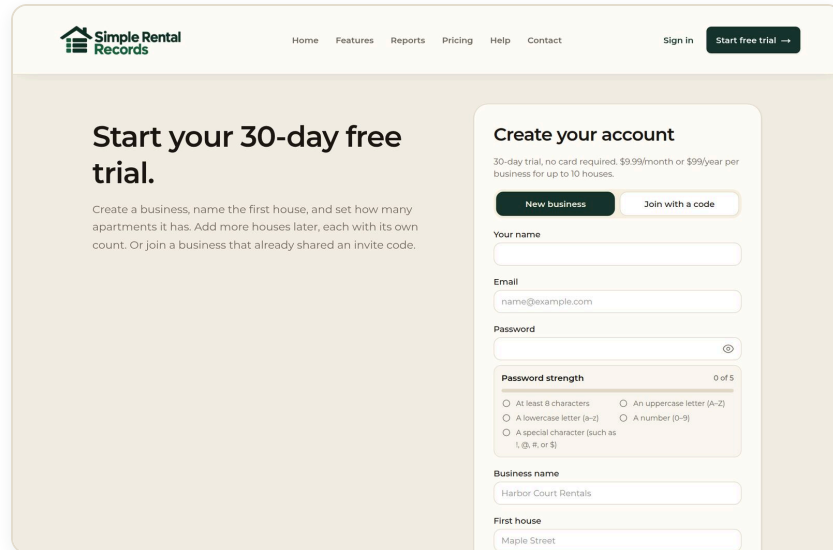
Shared demo resets nightly. Please don't enter personal information.

A SIMPLER ROUTINE

From everyday entries to a clearer month.

The home page at simrentrec.com: Start free trial, Try Live Demo, and Sign in

Create your account



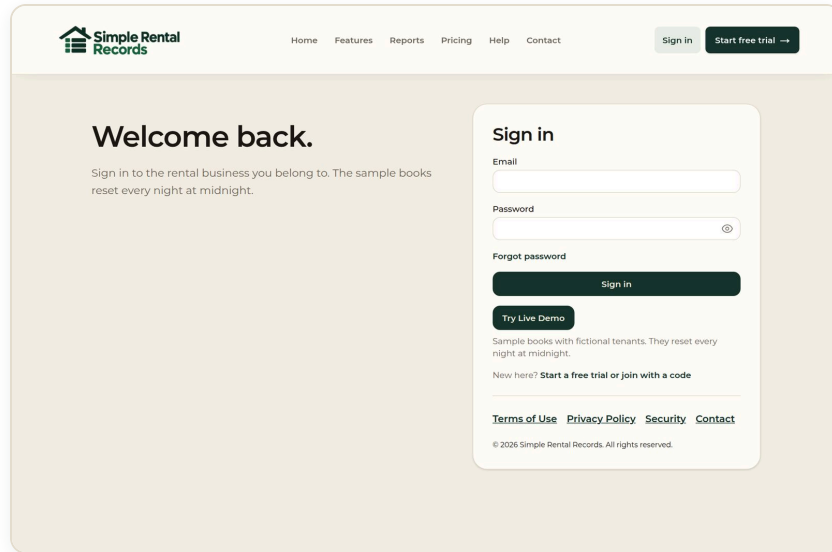
The sign-up page at simrentrec.com/signup

- 1 Go to **simrentrec.com** and click **Start free trial**.
- 2 Enter **Your name**, **Email**, and a **Password**. The meter under the password shows its strength; a long phrase works best.
- 3 Under **Business name**, enter the name for these books, for example *Harbor Court Rentals*.
- 4 Enter your **First house** (for example *Maple Street*) and how many **Apartments in that house**. Use 1 for a single-family home. You can add more houses later.
- 5 Click **Create business**.
- 6 Open the confirmation email and click its link (it expires after 24 hours), then **Confirm my email**.

JOINING SOMEONE ELSE'S BOOKS?

If an owner gave you an **invite code**, choose **Join business** on the sign-up page and enter the code instead of creating a business. See chapter 12.

Signing in



The sign-in page, with Forgot password below the form

- 1 Click **Sign in** at the top of any public page and enter your email and password.
- 2 If you turned on two-step sign-in, enter the 6-digit code from your email or authenticator app. A recovery code also works.
- 3 You arrive on your **Dashboard**.

For your security, a session ends after 30 minutes without activity. Forgot your password? Click **Forgot password** on the sign-in page and follow the emailed code.

Houses and apartments

The **Houses** page is where you describe your properties: each house's name and address, its apartments, and the monthly rent for each one.

OWNERS ONLY

Only owners can add, rename, or remove houses and apartments, or change rent. Members can see this page.

HOUSES

Houses and apartments

Categories

Manage each house's apartments, rent, and tenants.

House capacity

1 / 10 houses used

9 houses remaining

Apartments excluded

► Add a house

Name and apartment count

House

Maple Street

1 of 1 houses

Maple Street

123 Maple Street, Springfield, MA 01103

Edit

Save name

APARTMENTS

3

OCCUPIED

3 of 3

RENT / MONTH

\$4,800.00

APARTMENT		MONTHLY RENT		TENANT	
Apartment 1	Save	\$ 1500.00	Save	Alex Morgan 123 Maple Street, Apartment 1, Springfield, ...	Edit tenant
Apartment 2	Save	\$ 1600.00	Save	Jordan Lee 123 Maple Street, Apartment 2, Springfield, ...	Edit tenant
Apartment 3	Save	\$ 1700.00	Save	Casey Taylor 123 Maple Street, Apartment 3, Springfield, ...	Edit tenant
Whole building	Shared	Save	Shared costs for the whole house, such as insurance or taxes.		
New apartment, e.g. Apartment 4		Add apartment		Remove house	

Houses and apartments: capacity, the selected house, its apartments, rent, and tenants

Add the address of your first house

- 1 Click **Houses** in the sidebar. Your first house is already there.
- 2 Next to the house name, click **Add address** (or **Edit**).
- 3 Enter the street, city, state, and ZIP code. Search the state by name or abbreviation.
- 4 Click **Save address**. The address appears on reports and the dashboard.

Add another house



Add a house: a name and how many apartments it has

- 1 On the Houses page, open **Add a house**.
- 2 Enter the **House name** and the number of **Apartments**.
- 3 Click **Add house**, then add its address as above.

The **House capacity** meter shows how many of your 10 houses are used. Apartments do not count toward the limit. Managing more than 10 houses? Contact us.

Name apartments and set the monthly rent

- 1 Choose the house in the **House** list.
- 2 In each apartment row, type the name you use on the lease (for example *Unit 2B*) and click the **Save** beside it.
- 3 Type the **Monthly rent** (for example 1500.00) and click the **Save** beside it. Do this for every apartment, even if it is empty today.
- 4 To add an apartment, type its name in **New apartment name** and click **Add apartment**.

THE WHOLE BUILDING ROW

Each house has a **Whole building** row marked *Shared*. Record costs that belong to the whole house there, such as insurance, property taxes, or a new roof. It has no rent or tenant.

REMOVING HOUSES AND APARTMENTS

Remove house permanently deletes the house **together with its payments, tenants, and lease files**. Export your ledger first (chapter 15) if you might need them. The bin icon removes an apartment only while it has no payments and no tenant history; otherwise it stays so your records remain complete.

Categories

A category says what money was for. Good categories make your totals meaningful and fill in the Schedule E worksheet for you.

The starter list

Every new business starts with these categories:

Group	Categories
Money in	Rent, Other income
Money out	Repairs, Utilities, Insurance, Property taxes, Maintenance, Cleaning, Management, Mortgage, Improvements, Other expense
Other movements	Security deposit, Owner money, Loan money, Transfer

Rent always stays on the list: the rent roll and rent balances use it.

Open the category list

- 1 Click **Categories** on the Houses page, or **Manage categories** on the Record page.
- 2 Use the **Received**, **Paid**, and **Other** tabs to browse. Each card says what the category is for and how many payments use it.
- 3 To rename one, change the name and click **Save name**.
- 4 To add one, type it under **New category** (for example *Snow removal*) and click **Add category**.

CATEGORIES

Category list

Open a page to see that group. Each card says what the category is for.

Received **Paid** **Other**

Money that comes in, including rent.

Rent **Rent roll**
Rent received, or a rent refund. The rent roll uses this category.
36 payments
Rent
Save name
Rent stays on the list so the rent roll has a category.

Other income
Laundry, parking, fees, and other money that comes in.
0 payments
Other income
Save name
Remove

New category
Supplies
Add category
New categories show on the Paid page.

Close

The category list, opened from Houses or Record

OWNERS ONLY

Only owners add, rename, or remove categories. Set them up **before** a CSV import, because import rows must name existing categories exactly.

WHICH CATEGORY SHOULD I USE?

Use **Security deposit** for deposits you hold and return, so they do not look like rent income. Use **Owner money** for money you put in or take out yourself, and **Loan money** for loan proceeds. Mortgage payments go under **Mortgage**; only the interest part is deductible, and the Schedule E report asks you to confirm it (chapter 11).

Tenants, leases, and rent balances

Each apartment keeps its current tenant and every earlier one, with their move-in and move-out dates, contact details, lease files, rent, and what they owe.

APARTMENTS
Maple Street
123 Maple Street, Springfield, MA 01103. Open an apartment for its tenant, lease, and cash for 2026.

House
Maple Street
Year
2026

\$400.00 rent owed today by current tenants in 1 apartment

MAPLE STREET
Apartment 1
Occupied
Alex Morgan · since Nov 1, 2025
123 Maple Street, Apartment 1, Springfield, MA 01103

Alex Morgan is paid up today
\$18,000.00 due Nov 1, 2025 – Oct 31, 2026 ·
\$18,000.00 paid

\$14,750.00
Cash difference in 2026

Monthly rent	Rent received
\$1,500.00	\$15,000.00
Received	Paid
\$15,000.00	\$250.00

Last entry Oct 1, 2026
Open →

MAPLE STREET
Apartment 2
Occupied
Jordan Lee · since Nov 1, 2025
123 Maple Street, Apartment 2, Springfield, MA 01103

JORDAN LEE OWES TODAY
\$400.00
\$19,200.00 due Nov 1, 2025 – Oct 31, 2026 ·
\$18,800.00 paid

\$15,600.00
Cash difference in 2026

Monthly rent	Rent received
\$1,600.00	\$15,600.00
Received	Paid
\$15,600.00	\$0.00

1 follow-up
Open →

MAPLE STREET
Apartment 3
Occupied
Casey Taylor · since Nov 1, 2025
123 Maple Street, Apartment 3, Springfield, MA 01103

Casey Taylor is paid up today
\$20,400.00 due Nov 1, 2025 – Oct 31, 2026 ·
\$20,400.00 paid

\$16,905.00
Cash difference in 2026

Monthly rent	Rent received
\$1,700.00	\$17,000.00
Received	Paid
\$17,000.00	\$95.00

Last entry Oct 1, 2026
Open →

The Apartments page: every apartment with its tenant, rent owed today, and the year's cash

Add the tenant who lives there now

- 1 Click **Apartment**, then open the apartment (or click **Edit tenant** on the Houses page).
- 2 Enter the **Tenant name** as it appears on the lease and the **Moved in** date.
- 3 Add the tenant's **Email**, **Telephone**, and **Mobile** if you have them. The line under each field shows the format.
- 4 Add a **Mailing address** if the tenant gets mail somewhere other than the apartment, or leave it blank.
- 5 Click **Save tenant**.

TENANT

Jordan Lee

Maple Street - Apartment 2 - moved in Nov 1, 2025
123 Maple Street
Apartment 2
Springfield, MA 01103
jordan@tenant.example

Tenant name

Jordan Lee

Moved in

11/01/2025

Email

jordan@tenant.example

Example: name@example.com

Telephone

(617) 555-0100

Example: (617) 555-0100

Mobile

(617) 555-0100

Example: (617) 555-0100

Mailing address

This is where the tenant gets mail. It can be this apartment or another address. Leave it blank if you do not have it yet.

Street

123 Maple Street

Apartment, suite, or floor

Apartment 2

City

Springfield

State

Massachusetts

ZIP code

01103

Save tenant

Tenant details at the top of an apartment page

Rent balance, rent, and the lease

TENANTS

Jordan Lee

Jordan Lee moved in on Nov 1, 2025. Record the day they leave, or the day the next tenant starts.

RENT BALANCE

\$400.00 owed

\$19,200.00 rent due Nov 1, 2025 – Oct 31, 2026 (part months by the day) - \$18,800.00 paid

RENT

\$1,600.00 a month from move-in, Nov 1, 2025

Change rent

Current lease

Fictional demo tenant.
jordan@tenant.example
123 Maple Street
Apartment 2
Springfield, MA 01103
No lease file yet.

Lease PDF or image

PDFs are saved as flattened copies. Keep the original separately to preserve digital signatures and editable fields.

Choose File No file chosen
Add lease

Record move-out

The rent balance, the tenant's rent, and the current lease

- **Rent balance** shows what the tenant owes today: rent due from move-in through the end of this month (part months counted by the day), minus the payments recorded in a Rent category for this apartment during their stay. It says *Paid up*, *owed*, or *paid ahead*.

- **Rent** shows the tenant's monthly rent. To record a rent increase, an owner clicks **Change rent**, enters the **New monthly rent** and the date it **Starts on**, and clicks **Save rent**. Earlier months keep the old rent.
- **Lease**: under **Lease PDF or image**, choose the file and click **Add lease**. PDFs are stored as flattened copies, so keep your signed original as well.

When a tenant moves out

- 1 On the apartment page, click **Record move-out**.
- 2 Review the date the tenant left and continue.
- 3 Type **RECORDED** to confirm, then click **Record move-out**. The apartment shows as *Vacant*.

When the next tenant moves in

Next tenant starts

Say when Jordan Lee left and when the new tenant started. A lease PDF or image can wait if you do not have it yet.

Jordan Lee left 10/19/2026	New tenant Name on the lease
Started 10/19/2026	Monthly rent (\$) 1600.00

The rent agreed with the new tenant. It starts on the day they move in.

Next tenant starts: the outgoing tenant's last day and the new tenant's details

- 1 Use **Next tenant starts** on the apartment page. Enter the day the current tenant **left** and the day the new tenant **Started**.
- 2 Enter the **New tenant** name and the agreed **Monthly rent**.
- 3 Add the lease, contact details, and a **Note** (for example where the paper copy is) if you have them.
- 4 Click **Save tenant change**. The previous tenant moves to **Earlier tenants**, with their balance and payments kept.

FORMER TENANTS WHO STILL OWE

If a tenant left owing money, it stays visible as *still owed by former tenants*. Payments they make later, recorded on the same apartment, reduce it.

Bringing in past records (CSV import)

If you kept this year's payments in a spreadsheet, import them in one go instead of typing each one. You can also skip this and enter them by hand (chapter 9).

OWNERS ONLY • BEFORE YOU IMPORT

Create the houses, apartments, and categories first (chapters 4 and 5). Each row's names must match them **exactly**.

Prepare the file

- 1 Click **Record**, then **Import & recurring**.
- 2 Under **Import a spreadsheet**, click **Open import**, then **Download CSV template**.
- 3 Copy your rows into the template, keeping these column headings in this order:

Column	What to put in it	Example
date	The day money changed hands, as YYYY-MM-DD	2026-01-02
property	House name, exactly as on the Houses page	Maple Street
apartment	Apartment name, or the whole-building row's name	Apartment 1
category	An existing category name	Rent
description	What it was for	January rent
money_in	Amount received, numbers only (leave blank if paid)	1500
money_out	Amount paid, numbers only (leave blank if received)	
note	Optional note or receipt number	Paid in full

Import it

- 1 Save the spreadsheet as **CSV** (up to 1 MB and 1,000 rows).
- 2 Click **Choose a CSV file**. A preview lists every row and any problem, such as a name that does not match.
- 3 Fix problems in your file and choose it again, or click **Confirm import**.

SAFE TO REPEAT

Rows already imported are skipped, so importing the same file twice never doubles your books. If two real payments are identical, add a note to one so both are kept. Check for payments you already entered by hand before importing.

Monthly payments (recurring rent and bills)

A monthly payment is a reminder for money that repeats: rent, a mortgage, a water bill. Each month it waits for you to confirm what actually happened, so only real money appears in your books.

RECORD

Import & recurring
Export full ledger CSV

← Back to record

Monthly payments

Rent and bills that repeat every month. Each one waits for you to confirm it, so only money that has actually been received or paid appears in your records and reports.

No monthly payments yet. Add one below.

+
Add a monthly payment
Close ^

Recurring rent or a bill. Each month waits for you to confirm it.

Enter exactly one amount, received or paid. Short months use their last day, then return to the original day.

Apartment

Maple Street · Apartment 1

Category

Rent

First due date

10/19/2026

Last due (optional)

mm/dd/yyyy

Money received (\$)

Money paid (\$)

Description

Save monthly template

↑
Import a spreadsheet
Open import v

Add many past rows at once from a CSV file.

Import & recurring: monthly payments and the spreadsheet import

Create a monthly payment

- 1 Go to **Record** → **Import & recurring**, and open **Add a monthly payment**.
- 2 Choose the **Apartment** and **Category**.
- 3 Set the **First due date** and, if it ends, the **Last due** date.
- 4 Enter **one** amount: **Money received** for rent, or **Money paid** for a bill. Add a **Description**.
- 5 Click **Save monthly template**.

For a due date on the 29th–31st, short months use their last day, then return to the original day.

Simple Rental Records · User Guide

Page 18

Each month: record, skip, or stop

Button or status	What it does
Record payment	Shown when a payment is due. Enter the Date the money changed hands and click Add to records . When several months are waiting, you can add them together.
Skip	Skips the oldest waiting month without recording money, for example a month the tenant did not pay.
Edit template	Changes the apartment, amount, or dates for future months. Payments already recorded stay as they are.
Stop	Turns the reminder off after you type STOP to confirm. Resume turns it back on.
Scheduled	Waiting for the due date.
Due	The due date has arrived and the payment is ready to record.
Stopped	The reminder is off. Nothing is added to the records until you resume it.
Completed	The last due date has passed. Choose a later last due date in Edit template to continue it.

REMINDERS DO NOT MOVE MONEY

Monthly payments never collect rent or pay bills, and nothing reaches your totals until you add it to the records. If reminder emails are turned on for your account, you will get an email when payments are waiting.

Recording money day to day

The **Record** page holds every payment for the house and year you choose. Record money as it comes in or goes out, and attach the receipt while you have it.

RECORD

Maple Street

66 entries in 2026.

House

Maple Street

Year

2026

Import & recurring

+ Record a payment

RECEIVED

\$47,600.00

PAID

\$21,205.00

DIFFERENCE

\$26,395.00

FOLLOW-UPS

1

Show them →

Search

Apartment

Category

Show

Q Tenant, receipt, repair...

All apartments

All categories

Browse

All entries

Apply

Filter by apartment, category, or words in the description and note.

Manage categories

Entries

66 entries

LEGEND

Rent

Repairs

Utilities

Insurance

Property taxes

Mortgage

DATE	DESCRIPTION	CATEGORY	NOTE	RECEIVED	PAID	
Oct 15, 2026	Full mortgage payment Whole building	Mortgage	Example receipt 042	—	\$1,500.00	
Oct 12, 2026	Property insurance Whole building	Insurance	Example receipt 041	—	\$200.00	
Oct 10, 2026	Water bill Whole building	Utilities	Example receipt 040	—	\$145.00	
Oct 1, 2026	Casey: October rent Apartment 3	Rent	Paid in full	\$1,700.00	—	
Oct 1, 2026	Jordan: October rent Apartment 2	Rent	Still owes \$400 Follow up	\$1,200.00	—	
Oct 1, 2026	Alex: October rent Apartment 1	Rent	Paid in full	\$1,500.00	—	
Sep 20, 2026	Property tax installment Whole building	Property taxes	Example receipt 039	—	\$900.00	

The Record page: totals, follow-ups, filters, and every payment

Record a payment

- 1 Click **Record a payment**.
- 2 Choose the **Apartment**, or **Whole building** for shared costs.
- 3 Set the **Date** the money changed hands.
- 4 Pick a **Category** (click **Browse** to see them all).
- 5 Under **What was it for?**, write a short description, for example *Alex: January rent*.
- 6 Optionally add a **Receipt or note**, such as a check number.
- 7 Choose **Received** or **Paid** and type the amount without a sign. The + or – is added for you.
- 8 Optionally add receipts: **Take a photo** on a phone, or **Choose files**. Up to 10 photos or PDFs, 10 MB per save.
- 9 Click **Save payment**. Totals and reports update straight away.

The screenshot shows a mobile app interface for recording a payment. At the top, there's a header with a plus icon, the word 'PAYMENT', and a close icon. Below this is the title 'Record a payment' and a subtitle: 'Choose the apartment, say what the money was for, then enter one positive amount as received or paid.' The form is divided into two main sections: 'DETAILS' and 'AMOUNT'. The 'DETAILS' section includes a dropdown for 'Apartment' (currently showing 'Apartment 1'), a date picker for 'Date' (showing '10/19/2026'), a dropdown for 'Category' (showing 'Rent' with a 'Browse' button), a text field for 'What was it for?' (containing 'Alex: January rent'), and a text field for 'Receipt or note' (containing 'Receipt number, tenant, or a reminder'). The 'AMOUNT' section has two radio buttons for 'Received' (selected) and 'Paid', a large text input for the amount (showing '+\$0.00'), and a note: 'Money coming in. Type the amount only. The + is added for you.' At the bottom, there's a 'RECEIPTS' section with an 'Optional' toggle. The bottom navigation bar has 'Cancel' and 'Save payment' buttons.

Record a payment

Find, view, correct, or delete a payment

- **Search and filter:** type words from the description or note in **Search**, choose an **Apartment**, **Category**, or **Show** option, and click **Apply**. **Clear** resets the filters.
- **View** (eye icon): see all details and open the attached receipts.
- **Edit** (pencil icon): change any detail or add more receipts, then **Save changes**.
- **Delete** (bin icon): removes the payment after you confirm.

Follow-ups

RECORD

Maple Street

Showing 1 of 66 entries in 2026.

House

Maple Street

Year

2026

Import & recurring

+ Record a payment

RECEIVED

\$1,200.00

PAID

\$0.00

DIFFERENCE

\$1,200.00

FOLLOW-UPS

1

Search

Tenant, receipt, repair...

Apartment

All apartments

Category

All categories

Browse

Show

Follow-ups only

Apply

Clear

Filter by apartment, category, or words in the description and note.

Manage categories

Entries

1 entry

LEGEND

Rent

DATE	DESCRIPTION	CATEGORY	NOTE	RECEIVED	PAID	
Oct 1, 2026	Jordan: October rent Apartment 2	Rent	Still owes \$400 Follow up	\$1,200.00	—	  

Showing 1–1 of 1

Rows per page

10

<<

<

1

>

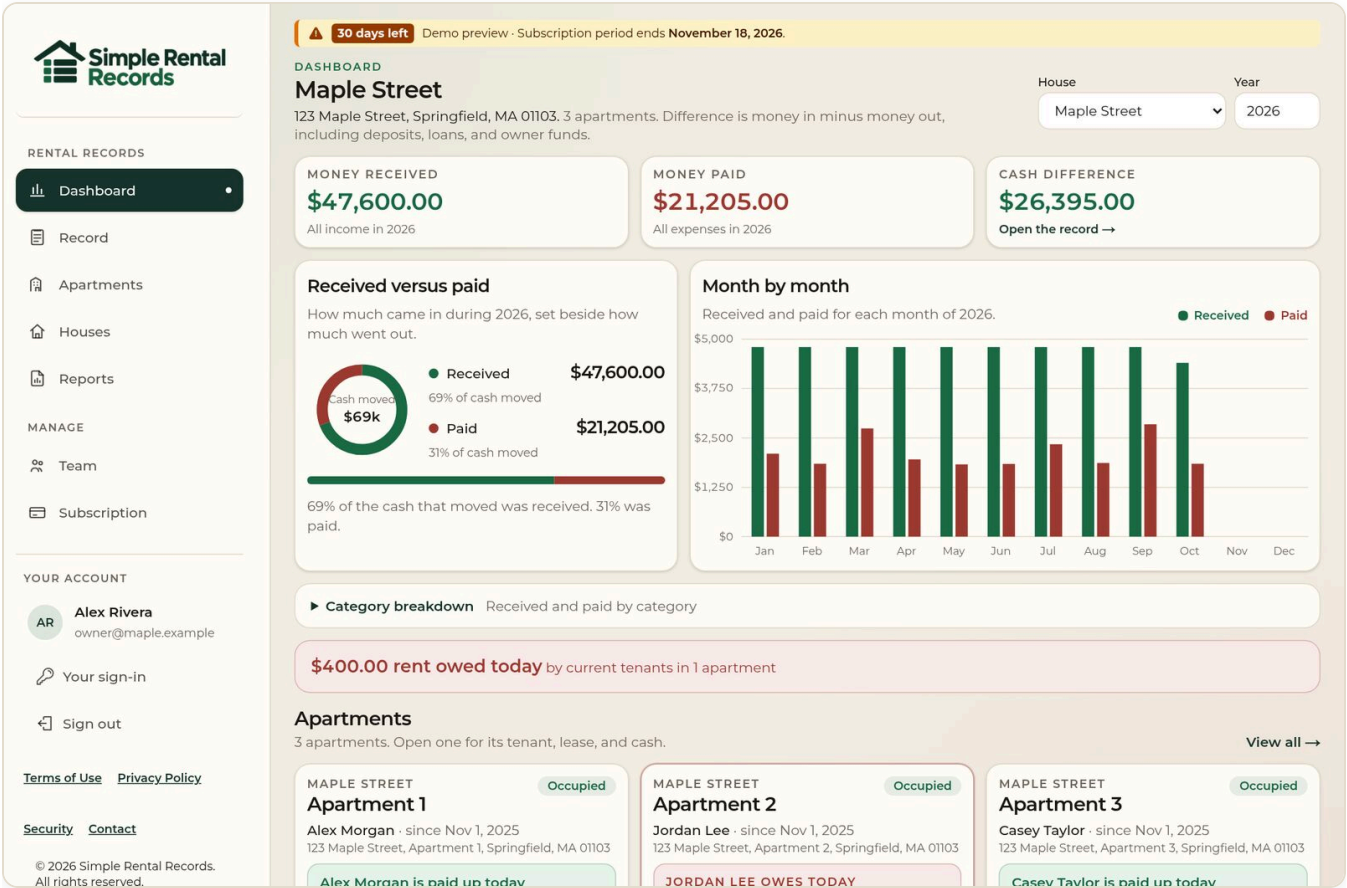
>>

Show → Follow-ups only lists payments that need attention

Write **owes** or **unpaid** in a payment's description or note (for example *Still owes \$400*) and it is marked *Follow up*. The **Follow-ups** card counts them; click **Show them** to list just those. Edit the note once it is settled.

The dashboard and apartment pages

The dashboard answers "how are my rentals doing this year?" at a glance. Each apartment page answers the same for one apartment.



The dashboard for one house and year

Section	What it shows
Money received / Money paid	All income and all expenses for the chosen year.
Cash difference	Money in minus money out, including deposits, loans, and owner money. Open the record shows the payments behind it.
Received versus paid	How the cash that moved this year splits between income and expenses.
Month by month	Received and paid for each month, to spot a missed rent or an expensive month.
Category breakdown	Received and paid per category. Click to open it.

Section	What it shows
Rent owed today	A red banner when current tenants owe rent, and a note for former tenants who still owe.
Apartments	A card per apartment with tenant, rent, rent owed today, and the year's cash.

CHOOSING THE YEAR

Use the **Year** box at the top right to look at earlier years. Rent owed is a balance **as of today**, so it appears only when the current year is selected; other years show their cash only. The year box stops at the current year unless you have entries dated later.

An apartment's own page

Open any apartment from **Apartments** to see its tenant (chapter 6), its received, paid, and cash difference for the year, charts, a **Where the money went** table by category, and every **Payment** for the year.

Payments					10 entries
DATE	CATEGORY	DESCRIPTION	RECEIVED	PAID	
Jan 1, 2026	• Rent	Jordan: January rent	\$1,600.00	—	
Feb 1, 2026	• Rent	Jordan: February rent	\$1,600.00	—	
Mar 1, 2026	• Rent	Jordan: March rent	\$1,600.00	—	
Apr 1, 2026	• Rent	Jordan: April rent	\$1,600.00	—	
May 1, 2026	• Rent	Jordan: May rent	\$1,600.00	—	
Jun 1, 2026	• Rent	Jordan: June rent	\$1,600.00	—	
Jul 1, 2026	• Rent	Jordan: July rent	\$1,600.00	—	
Aug 1, 2026	• Rent	Jordan: August rent	\$1,600.00	—	
Sep 1, 2026	• Rent	Jordan: September rent	\$1,600.00	—	
Oct 1, 2026	• Rent	Jordan: October rent	\$1,200.00	—	

Payments for one apartment and year

Reports

Reports turn your payments into documents you can save, print, or send to a partner, lender, or tax preparer.

REPORTS

Reports

Run a report for any period, then view it, print it, or download it as PDF or CSV. Every run is saved here.

Run a report

Every run is saved below.

Operating statement

Rent roll

Transaction register

Schedule E worksheet

Tenant directory

Operating statement: Income, expenses, and net operating income for the period, the way a lender or partner reads it.

Houses

Maple Street

Period

Full year

Year

2026

Run report

Saved reports

Figures are kept as they were when the report ran. Open one and choose Run again for new entries.

0 reports

No reports yet. Run one above and it will be saved here.

Run a report, then find every run under Saved reports

Report	Use it for
Operating statement	Income, expenses, and net operating income for the period, the way a lender or partner reads it.
Rent roll	Every apartment with its tenant, monthly rent, rent expected, rent collected, and deposit held.
Transaction register	Every payment in the period with a running balance: the full detail behind the totals.
Schedule E worksheet	Rental income and expenses grouped by IRS Schedule E lines, one column per house.
Tenant directory	Current tenants with move-in date, rent, and contact details. Vacant apartments are listed too.

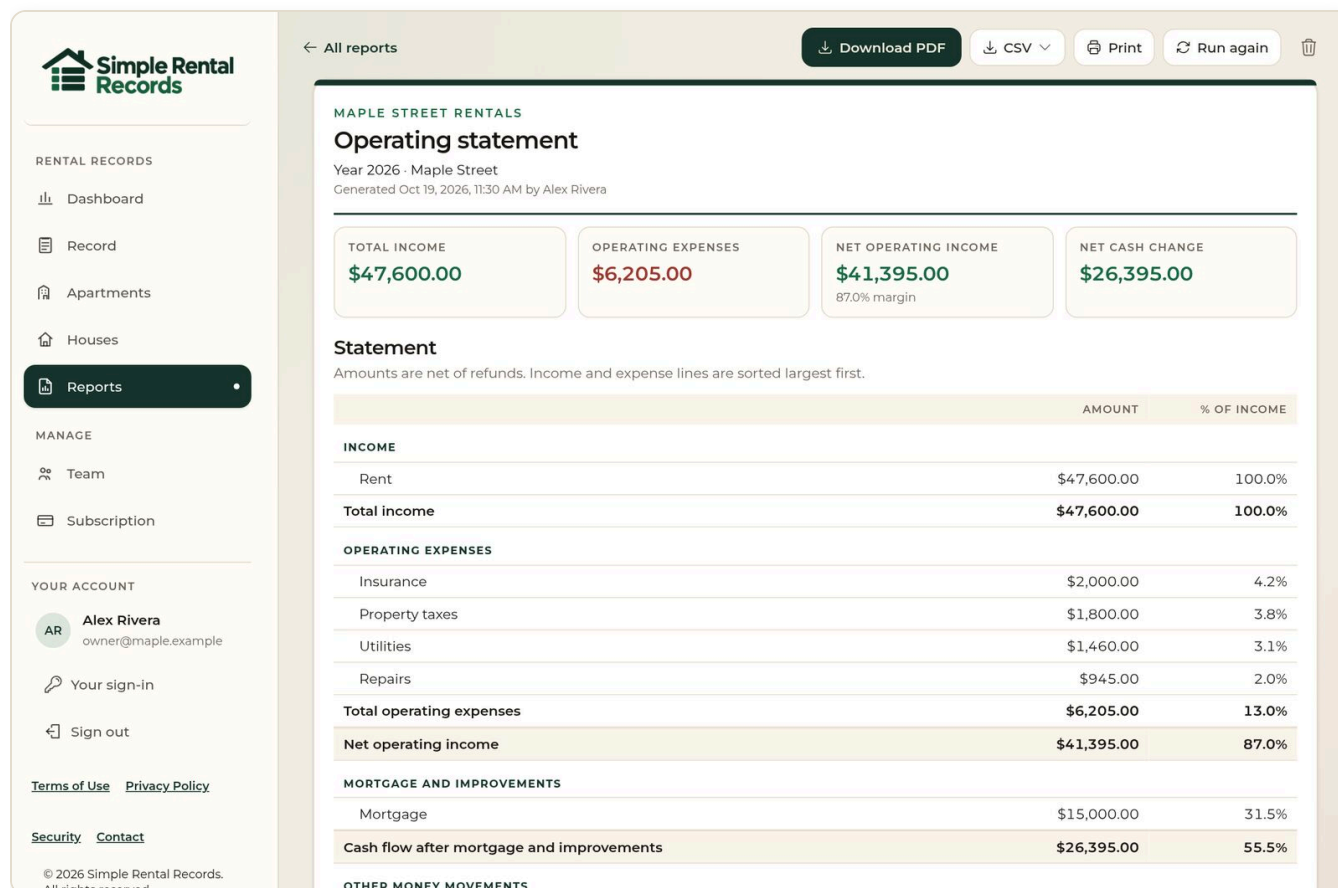
Run a report

1 Click **Reports** and choose the report.

Simple Rental Records · User Guide

Page 25

- 2 Choose the **Houses** (one or all) and the **Period**: Full year, Year to date, Quarter, Month, or Custom dates.
- 3 For the Schedule E worksheet, enter the **mortgage interest** from your lender's statement for each house: interest only, not principal or escrow, and 0 if none. Tick the box to confirm you checked the figures.
- 4 Click **Run report**. The report opens and is saved under **Saved reports**.



A saved operating statement, with Download PDF, CSV, Print, and Run again

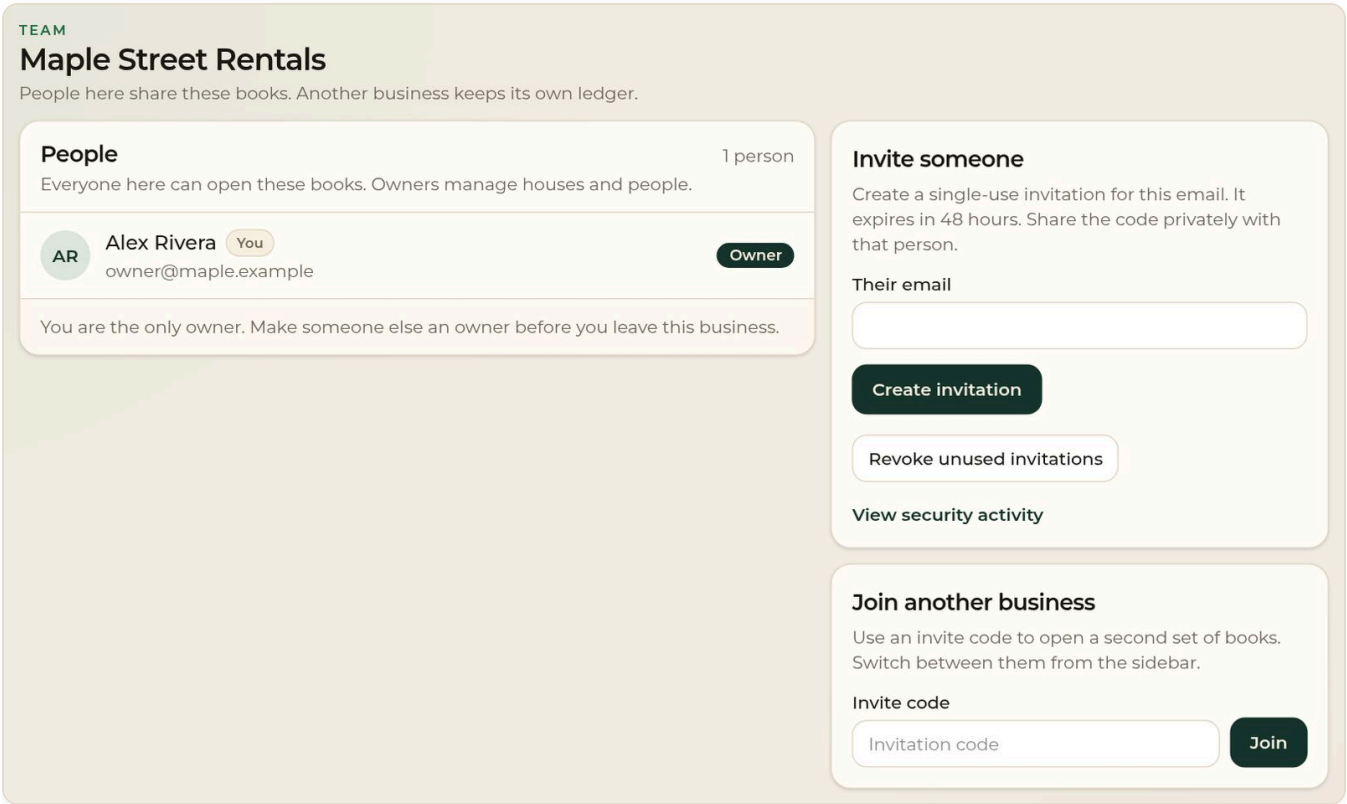
- **Download PDF** and **CSV** give you a copy to send or open in a spreadsheet. **Print** prints it.
- Saved reports keep the figures from when they ran. After recording more payments, open the report and click **Run again**.

ABOUT THE SCHEDULE E WORKSHEET

It is a worksheet to review with your tax preparer, not a tax return. Full mortgage payments are not deductible; only the interest you confirm is used.

Working with a team and more than one business

Share the books with the people who help you, and keep separate books for separate businesses.



The Team page: people, invitations, and joining another business

Role	Can do
Owner	Everything: houses, apartments, rent, categories, import and export, people and roles, subscription, and requiring two-step sign-in.
Member	Record and correct payments, manage tenants and leases, set up monthly payments, and run reports.

Invite someone

- 1 Click **Team**. Under **Invite someone**, enter **Their email**.
- 2 Click **Create invitation**. A single-use code appears; it expires in 48 hours.
- 3 Send the code privately. They sign up with **Join business**, or, if they already have an account, enter it under **Join another business**.

4 When they appear under **People**, use **Make owner** or **Make member** to set their role.

Revoke unused invitations cancels codes not yet used. **Remove person** ends someone's access.
A business always needs at least one owner.

More than one business

Each business has its own houses, payments, team, and subscription. To open another, join with an invite code or create a business from the business list, then switch from the sidebar. To leave a business, use **Leave this business** on the Team page.

Keeping your account secure

Your books hold tenant details and financial records. A strong password and two-step sign-in keep them yours.

Open your sign-in settings

Click **Your sign-in** under **Your account** in the sidebar. From there you can:

- **Change password:** enter the current password and a new one.
- **Email codes:** require a 6-digit code sent to your email at sign-in.
- **Signed-in devices:** see where you are signed in, **Sign out** any session you do not recognize, or **Sign out all devices**.

Turn on an authenticator app

- 1 Install an authenticator app (for example Google Authenticator, Microsoft Authenticator, or 1Password) on your phone.
- 2 Under **Authenticator app**, enter your current password and click **Start setup**.
- 3 Add an account named Simple Rental Records in the app using the key shown (setup expires in 10 minutes).
- 4 Enter the 6-digit code from the app and click **Verify and enable**.
- 5 Save the **recovery codes** somewhere private. They are shown only once and let you sign in if you lose your phone.

The screenshot shows the 'Account security' page. At the top, there's a 'Back to books' link and the title 'Account security'. Below that is a link for 'Your sign-in'. The main section is 'Authenticator app', which includes instructions to use a six-digit code from an authenticator app and a note about recovery codes. There's a 'Current password' input field with an eye icon and a 'Start setup' button. Below this is the 'Signed-in devices' section, which states that sessions end after 30 minutes of inactivity. It lists four sessions: 'This device' and three 'Other session' entries, each with a 'Sign out' button. At the bottom of the sessions list is a 'Sign out all devices' button.

Authenticator app and signed-in devices

OWNERS: REQUIRE IT FOR EVERYONE

An owner can choose **Require for everyone** so every person must use an authenticator before the books open. **Make optional** turns the rule off.

Sessions end after 30 minutes of inactivity. Owners can review the latest security activity from the Team page (**View security activity**).

Your free trial and subscription

Each business gets 30 days free with no card. Choose a plan before the trial ends to keep making changes.



HomeFeaturesReportsPricingHelpContact

Sign inStart free trial →

One plan. Simple pricing.

\$99 / year

Per business - equivalent to \$8.25/month

Save \$20.88 a year compared with monthly billing.

MonthlyYearly

Start free trial

Take your time exploring. No card required.

ONE PLAN FOR YOUR RENTAL BUSINESS

More clarity. Less paperwork.

Keep your rental records organized with simple tools that make day-to-day bookkeeping feel manageable.

✓ Up to 10 houses per business

✓ Every current feature, included in one plan

✓ Reports, receipts, and tenant records in one place

Managing more than 10 houses? [Contact us](#) and we will find a plan that fits.

Explore everything included →

THE COMPLETE TOOLKIT

More than a place to enter rent.

Monthly and yearly billing include the same current functionality. Some tools are reserved for business owners.

01
Everyday bookkeeping
Keep the details behind every dollar in one place.

02
Properties & apartments
Organize your portfolio the way you manage it.

03
Tenants & rental history
Keep the context when one tenant leaves and another arrives.

The Pricing page at simrentrec.com/pricing: one plan, billed monthly or yearly

Plan	Price	Includes
Monthly	\$9.99 per month	Every feature, for one business with up to 10 houses
Yearly	\$99 per year (saves \$20.88)	

Subscribe

1

Click **Subscription** in the sidebar. The page shows the days left in your trial.

2

Choose **Monthly** or **Yearly**. You go to Stripe's secure checkout to enter your card.

3

After paying you return to the Subscription page. Access updates as soon as Stripe confirms; refresh after a moment if needed.

Simple Rental Records • User Guide

Page 30

- **Manage billing** opens Stripe to update your card, see invoices, or cancel at the end of the period.
- **Renew early:** within 31 days of your coverage ending, you can pay for the next period. It starts when the current one ends, so no time is lost.
- **Voucher:** if you received a one-year voucher code, enter it under **Redeem a voucher**.

IF THE TRIAL ENDS

Your books become read-only. You can still view everything and download records, reports, receipts, and leases. Subscribe to make changes again. Nothing is deleted.

OWNERS ONLY

Only an owner can subscribe or manage billing. The subscription covers everyone in the business.

Taking your data with you

Your records are yours. You can take a copy at any time, even when the books are read-only.

What	How
All payments (full ledger)	Record → Import & recurring → Export full ledger CSV (owners). Opens in Excel, Numbers, or Google Sheets.
Reports	Open a saved report → Download PDF or CSV .
Receipts	Open a payment (eye icon) and click each receipt to open or save it.
Leases	Open the apartment page and click the lease file.

We back up the database every day and keep a nightly copy of receipts and leases in a second location. Keeping your own periodic export is still good practice.

Troubleshooting and common questions

Question	Answer
I did not get the confirmation email or sign-in code.	Check your spam or junk folder and wait a minute; a new code can be sent after one minute. Codes expire after 10 minutes, confirmation links after 24 hours.
I can't add a house or change rent.	Only owners can. Ask an owner on the Team page to make the change, or to make you an owner.
Why can't I save anything?	The trial has ended and the books are read-only. An owner can subscribe on the Subscription page.
I see "Business access restricted" or "This business is paused".	A system administrator has paused or suspended the business, for example while an account issue is resolved. You can still view and export the records, but not change them. Contact us (chapter 17) to restore access.
A tenant shows as owing, but they paid.	Check the payment was recorded on that tenant's apartment, in the Rent category, with a date during their stay. Also check the move-in date and the rent amount.
Rent owed disappeared when I chose another year.	That is expected: rent owed is a balance as of today and shows only with the current year selected.
My import says a name does not match.	The house, apartment, and category in that row must match the app exactly, including spaces. Create the missing item or fix the spelling, then import again.
I entered the wrong amount.	On the Record page, click the pencil icon on that payment, correct it, and click Save changes .
A monthly payment reminder is wrong.	Use Edit template to change future months, or Skip to pass over a month without recording money.
I lost my phone with the authenticator.	Sign in with one of your recovery codes, then disable and set up the authenticator again on your new phone.
I was signed out unexpectedly.	Sessions end after 30 minutes without activity. Sign in again; nothing you saved is lost.
Does the app collect rent or pay bills?	No. It records money you have received or paid. Monthly payments are reminders you confirm.

Getting help

We are glad to help you set up your books or answer a question.

- 1 Go to **simrentrec.com/contact** (or click **Contact** at the bottom of any page).
- 2 Send a message, or ask us to call you, and choose how you would like us to reply.
- 3 Include the page you were on and what you expected to happen. Please do not send passwords or full card numbers.

Video tour

A 7-minute video walks through the same chapters, with captions. Watch it at **simrentrec.com/guide**, where you can jump straight to any chapter.

Policies

The **Terms of Use**, **Privacy Policy**, and **Security** pages explain how the service works, what we keep, and how your books are protected. They are linked at the bottom of every page and in the sidebar after you sign in.

Quick reference

I want to...	Go to
Record rent or an expense	Record → Record a payment
Add a house or apartment, or change rent	Houses
Add, change, or move out a tenant	Apartments → open the apartment
See what tenants owe	Dashboard or Apartments (current year)
Set up monthly rent reminders	Record → Import & recurring
Import a spreadsheet	Record → Import & recurring → Open import
Get numbers for taxes	Reports → Schedule E worksheet
Invite a partner or bookkeeper	Team
Turn on two-step sign-in	Your sign-in
Subscribe or update a card	Subscription

© 2026 Simple Rental Records. Simple Rental Records keeps records; it does not give tax or legal advice. Review reports with a qualified tax preparer.